



County Executive Office

County of Orange

2004

Business Plan

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County Executive Officer

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Executive Summary

The County Executive Office (CEO) is the corporate administrative branch of Orange County government. The CEO is responsible for providing leadership, vision, and knowledge of emerging trends and issues impacting Orange County. The CEO, in turn, supports and implements Board of Supervisors policy and ensures that the County of Orange operates in an efficient, accountable, and responsive manner. The County Executive Officer provides direction to all County agency/department heads directly assigned to him and also provides administrative oversight to those department heads who report directly to the Board of Supervisors. In addition, CEO staff also has budgetary oversight of all elected department budgets.

The mission of the County Executive Office is to support and implement Board policy and direction through corporate direction and leadership, communication and coordination of strategic and regional planning, and to ensure effective service delivery through efficient management of the County's workforce and resources.

The complexity and variety of services provided by the County of Orange, in addition to oversight of a \$4.6 billion budget, and issues confronting County government warrants a management style that is both efficient and effective. In January of 2004, the County Executive Officer recommended that the Board of Supervisors approve a reorganization plan for County government that would enable greater accountability, more effective management, focused coordination of critical planning, better direction of County services, and increase support of the Board of Supervisors. The Board approved this reorganization on January 13, 2004 and the adopted County organizational chart appears on page 12. The reorganization also resulted in the annual net county cost (NCC) savings of \$513,000.

This reorganization has reduced the number of direct reports to the County Executive Officer from 17 to 7. Assistant CEO duties have been realigned and the titles changed to Deputy CEO. The four Deputy CEO's will oversee four broad areas:

- *Infrastructure and Environmental Resources (IES)*
- *Government and Public Services (GPS)*
- *Office of Information and Technology*
- *Office of Finance*

The other direct reports to the County Executive Officer will also include *Human Resources* which will return to independent department status, *John Wayne Airport*, and the *Assistant to the County Executive Officer*. Additionally, the CEO staff responsible for the Orange County Development Agency has been reassigned to Housing and Community Services, and the Child Care Coordinator has been assigned to the Social Services Agency.

The Deputy CEO for Infrastructure and Environmental Services and Deputy CEO of Government and Public Services will each provide leadership, oversight, and coordination to five departments. This element of the County's new structure will enable a more focused proactive approach to policy issues facing the County. As issues arise, CEO staff can dedicate key personnel as issues arise and develop solid policy options and recommendations for the County Executive Officer to present to the Board of Supervisors.

The Board adopted reorganization complements several other management initiatives that have been implemented by the County Executive Office. These include:

- Department Management Committee: The formation of a Management Committee composed of eight department heads and one representative of the CEO that meets on a regular basis to address operational and budget issues impacting the organization.
- Succession Planning: The CEO has also required that all County department heads develop a succession plan in order to identify and develop future leadership. As the County addresses the end of the baby boom and faces retirements of key staff as well as turn over, "development of the bench" becomes more important.
- The County Leadership Academy: This initiative began in January of 2004, and will provide a comprehensive and consistent management philosophy and training opportunity for current and future leaders within County government.
- The County Connections newsletter for all County staff began in January 2004 and serves to reinforce County goals inform our employees and enhance morale.

ISSUES

The most significant challenge faced by County government has been, and continues to be, the uncertainty of the State budget cuts and their potential impact on County services. This daunting task includes addressing the potential impacts of another major property tax revenue shift from the County ranging as high as \$69 million and the potential result of key program reductions as recommended in the Governor's budget proposal released on January 10, 2004.

The County Executive Office, where possible, has developed strategies and approaches to identify alternatives for the Board and the Legislature to minimize local impacts. The County Executive Office continues to focus on identifying various financial options for the Board of Supervisors to utilize in addressing potential impacts from these budget scenarios. CEO staff will continue to tightly monitor our expenditures and has maintained a limited hiring freeze.

Another major financial impact to the County includes the possible diversion of Proposition 172 Public Safety Services Fund from the Sheriff's Department and the District Attorney to the Orange County Fire Authority (OCFA). These voter approved funds have been allocated 80 percent to the Sheriff and 20 percent to the District Attorney and was intended to offset the previous ERAF shift of property tax revenues from the County. OCFA was exempt from that shift. The potential reduction of additional revenue from the General Fund could not come at a more challenging time given the stresses of the State's fiscal condition. CEO staff will provide detailed financial information concerning the fiscal impact of this possible revenue diversion and will assist the Board with its policy deliberations on this key issue.

While the Orange County Superior Court's ruling on the property tax assessment methodology process was overturned at the Appellate level, CEO staff in concert with the Assessor and County Counsel will continue to monitor developments and keep the Board apprised as this issue progresses to resolution.

In addition, there are a variety of issues and projects that will be addressed in 2004. These include the enterprise system mainframe upgrades and replacement planning, software upgrade and hardware replacement for the assessment tax system, the Animal Care Services potential relocation, the proposed new South Orange County Courthouse, the SB1732 transition of trial court facilities from the County to the State, and the impacts of various legislative items during 2004 including the Workers Compensation reforms under consideration.

Despite the budget challenges of 2003, the County has continued to progress toward resolving a number of issues. An outline of last year's accomplishments along with the goals for 2004 is included with this document. Last year's success and the planning and preparation ensure that the County Executive Office will meet the new and continuing challenges proactively and will fulfill its stated mission, "to support and implement Board policy and direction and leadership through corporate direction and leadership, communication and coordination of strategic and regional planning, and to ensure effective service delivery through efficient management of the County's workforce and resources."

CEO Staff will analyze and recommend strategies for long-term debt reduction.

2004 MISSION & GOALS

CEO MISSION STATEMENT

To support and implement Board policies and direction through corporate direction and leadership, communication and coordination of strategic and regional planning and to ensure effective service delivery through efficient management of the County's workforce and resources.

To support and implement Board policies and direction...

The CEO is responsible for supporting the Board's decision-making authority by providing comprehensive, quality and timely issue research and analysis. Once policy direction is established, the CEO then formulates, executes and monitors programs/activities that adhere to the spirit and intent of those directives.

...through corporate direction and leadership...

Through its divisions of Finance, Infrastructure and Environmental Services, Government and Public Services, and Information Technology, the CEO works with seven elected, 12 CEO-appointed and three Board-appointed department heads. With CEO direction and oversight, the departments implement Board policy direction, ensure fiscal integrity, and coordinate the operations and services of the County. To successfully fill this role, the CEO reviews and comments on Board agenda items, oversees countywide funds, coordinates the annual budget process, manages the County's long-term debt, negotiates and implements employee terms and conditions of employment, and evaluates the performance of CEO-appointed department heads.

...communication and coordination of strategic and regional planning...

The CEO provides leadership in planning and establishing effective governance structures and relationships for the accomplishment of County corporate and regional goals and objectives. Major responsibilities include coordination of all Federal and State legislative advocacy efforts, communication to the public, stakeholders and employees, conducting organizational assessments, providing oversight and coordination of a number of regional issues. Examples of these regional issues include, but are not limited to, watershed, low-income housing, animal care and external restructuring of County unincorporated islands.

...and to ensure effective service delivery through efficient management of the County's workforce and resources.

The CEO is committed to building an environment in which employees are encouraged to excel. The CEO is developing an efficient, effective and accountable workforce by creating a learning environment focused on employee enrichment activities designed to increase productivity and develop a pool of qualified leaders for the future.

2004 GOALS

The CEO has adopted four goals to achieve its mission. These inter related goals were developed to convey the value that the office provides to County government and to the community it serves.

Goal 1: Facilitate, support and ensure the implementation of decisions by the Board of Supervisors

This goal is intended to describe the CEO's comprehensive role in providing the Board the assistance needed to make informed decisions on a variety of issues that impact Orange County businesses and residents. Upon completion of Board review and direction, CEO staff ensures that implementation is completed in an efficient and cost-effective manner.

Goal 2: Improve County government's effectiveness in addressing community issues and needs

The CEO, with Board approval, developed a new administrative structure and processes to improve County government's ability to effectively address the issues and needs of the community. In addition, the CEO ensures a consistent approach in addressing community issues and needs through a Corporate Management System which includes the Strategic Financial Plan, Department Business Plans, and employee training and Pay for Performance Compensation Plan.

Goal 3: Ensure the financial strength and integrity of the County of Orange

Financial management, to a large extent, includes the utilization of the County's resources to effectively and efficiently operates the County. In addition, prudent financial and operational management will continue to enhance the County's credit rating and confidence with Wall Street, resulting in reduced costs for borrowing money to fund important strategic priorities. For the past several years, the County's strategic financial planning efforts have provided an important hedge against changing economic conditions, as well as reducing the County's bankruptcy indebtedness.

Goal 4: Preserve and advance the regional services and infrastructure that the Orange County community relies upon by working collaboratively with other levels of government and community-based organizations to ensure that regional issues and needs are addressed

The CEO is responsible for safeguarding community interests, which involves the development of County responses to Federal, State and local issues or mandates. Several of the strategies/projects identified in this business plan require favorable legislation for full implementation of the County's position. The County of Orange is also the main provider and coordinator of regional projects and essential public services. The issues addressed by the Board of Supervisors and implemented by the CEO have considerable impact on County residents' quality of life. They also require collaboration and planning from various segments of society, and clear, effective communication with employees, residents, office holders and other stakeholders.

These goals form the basis for the development of the Operational Plan detailed in the following section.

2004 OPERATIONAL PLAN

CLIENTS

Orange County Board of Supervisors

The County of Orange is a Charter County divided into five districts and governed by a five-member, elected Board of Supervisors who serve four-year terms of office. As the executive branch of Orange County government, the CEO supports the Board of Supervisors by providing the corporate leadership, vision and knowledge of emerging trends and issues that are needed to develop and implement Board policy and ensure efficient, accountable and responsive County operations.

The Community

Orange County is a diverse community composed of a broad range of interest groups including businesses, non-profit organizations, advocacy groups, special districts, regional service providers, 34 cities, regional airport, 42 miles of coastline, and a diverse population.

County Agencies/Departments

The County organizational structure is composed of 23 agencies/departments including seven departments with a voter elected department head, 4 with a department head appointed by the Board of Supervisors, and 12 with department heads appointed by the County Executive Officer. The CEO has budget oversight authority over the seven elected department heads and 4 Board appointed department heads. In addition, two of the CEO appointed department heads (John Wayne Airport director and Human Resources Director) report directly to the CEO. The remaining 10 department heads report to two Deputy CEOs. The CEO is responsible for working with all departments to ensure that Board policy and direction are fully executed, while ensuring that County programs and resources are coordinated and fully optimized.

County Employees

The County currently has a workforce of 17,675 authorized positions. The Board and the CEO recognize employees as County government's greatest asset. To continuously improve efficiency, accountability and program success, the CEO works with department heads and labor organizations to develop and implement workforce programs that support training and skill development, reward superior performance and encourage open communication throughout the organization. In addition, the CEO negotiates labor contracts that govern employees' terms and conditions of employment.

Investors

The County relies on investors to purchase County bonds that support bankruptcy recovery and the financing of major long-term projects. Rating agencies and potential and current investors are attentive to an organization's leadership and business practices. The CEO takes the lead in maintaining the confidence of Wall Street by providing a stable organizational structure, management systems and financial stability. CEO staff effectively and regularly communicates these attributes to the investment community to demonstrate that the County maintains a system of financial checks, balances and standards relative to financial security, accountability and disclosure.

2004 STRATEGIES

The following are the strategies the CEO intends to implement to achieve the FY 04-05 Goals:

Goal 1: *Facilitate, support and ensure the implementation of decisions by the Board of Supervisors*

- Provide comprehensive and timely analysis and recommendations regarding emerging legislation, funding impacts, trends and issues. Staff will also interact with and/or develop partnerships with external bodies on matters of common interest and analyze and coordinate Board agenda items.
- Conduct regular Board briefings to keep each Supervisor apprised of changing events and their impact on County operations and resources.
- Develop and recommend strategies that enable the County to manage the financial impact of State and Federal budget decisions while helping the County achieve its strategic priorities.

Performance Measurement

Outcome Measure	FY 02 -03 Results	FY 03-04 Plan	FY 03-04 Actual Target Or Targeted Results	FY 04-05 Plan	How are we Doing?
Board Rating of CEO Support What: Board Members rate quality of support provided by CEO Why: To provide CEO with feedback on quality of support provided to the Board	Draft survey document developed	Conduct survey	As a cost-saving measure, the CEO delayed utilizing a consultant to conduct the survey.	CEO will examine feasibility of conducting survey in-house.	Not applicable

Goal 2: *Improve County government's effectiveness in addressing community issues and needs*

- Complete the implementation of the CEO reorganization to improve oversight and assistance to each of the County departments to assist in the delivery of services to the general public.
- Continue to review the County structure and find more efficient and cost effective ways of operating and delivering services to the general public.
- Develop collaboratives with the public and private sectors to enhance services and the delivery of those services.
- Complete contract negotiations with 13 bargaining units to ensure implementation of employee ratified and Board approved agreements.

Performance Measurement

Outcome Measure	FY 02-03 Results	FY 03-04 Plan	FY 03-04 Actual or Anticipated Results	FY 04-05 Plan	How are we doing?
<p>Agency/Department ratings of value of strategic, financial, technology, communications, and human resources support provided by CEO</p> <p>What: Provide CEO with feedback on agency/department assessment of the value of the strategic, financial, technology, communications, and human resources support provided by the CEO in improving their ability to address community issues and needs</p> <p>Why: To measure the effectiveness of the leadership and services provided by the CEO to agencies/departments</p>	Draft survey document developed	Conduct survey	As a cost-saving measure, the CEO delayed utilizing a consultant to conduct the survey.	CEO will examine feasibility of conducting survey in-house.	Not applicable

Goal 3: *Ensure the financial strength and integrity of the County of Orange*

- Continue to develop and implement strategies to accelerate debt reduction through defeasance, refunding, interest rate reductions, purchase and cancellation and/or funds reprogramming.
- Maintain solid working relationships with rating agencies, investors and insurers seeking opportunities for debt reduction.
- Propose implementation of a Strategic Financial Plan that addresses the current budget crisis while protecting core County functions.
- Continue to provide support to County agencies in real estate processes and the purchasing functions.
- Continue to refine loss prevention, mitigation and financing strategies, and recommend competitive insurance strategies.
- Update County information technology strategic plan to improve and align County wide information technology.

Performance Measurement

Performance Measure	FY 02-03 Results	FY 03-04 Plan	FY 03-04 Actual or Anticipated Results	FY 04-05 Plan	How are we doing?
County of Orange Credit Ratings What: Ratings by major bond rating companies (Moody's, S&P, Fitch) Why: Credit ratings are indicative of financial creditworthiness and therefore factor into the County's borrowing cost.	Moody's and Standard & Poor's continued County's issuer ratings of Aa2. and A+, respectively	Maintain/ Improve Rating	Maintain Rating	Maintain/ Improve Rating	The County has managed to maintain its credit rating at the same time California's rating slides.
County Proposed Budget consistency, measured in dollars and projects, to Strategic Financial Plan (SFP) What: Indicates extent to which departments consider SFP in developing programs/budget Why: The annual budget implements the first year of the SFP requiring the two to be consistent	The FY 01-02 Plan was \$455 million for 15 projects. The budget was approx. \$455 million for 15 projects. A 16 th project is planned but the scope of work needs clarification for funding identification.	The Plan for 03-04 is \$544 M; includes 7 strategic priorities and \$39 M in cost reduction or 1-time revenue measures. Seven previously approved Strategic Priorities were considered to be critical and remained in the Plan.	The budget for 03-04 is \$558 M and includes \$37 M in cost reductions/1-time revenue measures. Preventative Maintenance was added to the budget in addition to the seven included in the approved 2003 SFP.	The plan for 04-05 is \$546 M. This Plan uses the basic concept of "limits" and limited use of reserves to bring projected costs into line with projected revenues.	Including the 2004 Plan, the last three SFPs have focused on reduced resources. The 03-04 proposed budget and the 04-05 preliminary budget were/are form the most part consistent with their respective financial plans.

Goal 4: *Preserve and advance the interests of the Orange County community by working with other levels of government and ensuring that regional issues and needs are addressed*

- Continue involvement in regional coordination, planning and program implementation efforts in the areas of Public Protection, Health Care and Human Services, and Environmental Resources.
- Continue meetings with the City Managers on a regular basis to discuss common issues and develop collaborative efforts to address those issues.
- Continue to support the Board members who serve on regional board and commissions as needed.
- Advocate County interests at the State and Federal level in concert with the Board of Supervisor's approved legislative platform.

Performance Measurement

Performance Measure	FY 02-03 Results	FY 03-04 Plan	FY 03-04 Actual or Anticipated Results	FY 04-05 Plan	How are we doing?
Local government ratings of regional services and coordination provided by the County What: Provides the CEO with feedback on the percent of local government officials within Orange County who positively rate County leadership Why: Provides CEO with an indicator of the quality of leadership that the office is providing to the community	Draft survey document developed	Conduct survey	As a cost-saving measure, the CEO delayed utilizing a consultant to conduct the survey	CEO will examine feasibility of conducting survey in-house	Not applicable
Legislative agenda What: Publish weekly Board of Supervisors' Legislative Bulletin with specific recommendations to be considered at regular Board of Supervisor Meetings Why: Provides CEO with a measure of the success of the CEO's efforts to define an appropriate legislative agenda and achieve results favorable to Orange County	Draft survey document developed	Conduct survey	As a cost-saving measure, the CEO delayed utilizing a consultant to conduct the survey	CEO will examine feasibility of conducting survey in-house	Not applicable

APPENDIX B

COUNTY EXECUTIVE OFFICE

MANAGEMENT TEAM:

County Executive Officer (James D. Ruth) – Provides corporate leadership and oversight to assure implementation of Board policies and directions. The CEO has seven direct reports, budget oversight responsibility for all County departments, and labor relations.

Office of Finance (Frederick A. Branca) – Provides leadership and oversight of the overall financial operations of the County. Major responsibilities include long-range strategic financial planning, public finance, risk management, budget, corporate business planning, corporate purchasing, and real estate support.

Office of Information and Technology (Dr. Daniel Hatton) - Provides leadership in the strategic planning, implementation, and overall best practices operations of corporate information technology to achieve County goals and objectives. Major responsibilities include the County IT Strategic Plan, IT Standards, IT Governance model oversight and management, IT policy development, Enterprise Data Center operations, local and wide area network operations applications development and programming, IT Assessments and telecommunications.

Office of Government & Public Services (William D. Mahoney) – Provides leadership in planning and establishing effective governance structures and relationships to accomplish county corporate and regional goals. Oversees management of the following County agencies/departments: Social Services Agency, Health Care Agency, Probation, Public Defender, and Child Support Services. Other major responsibilities include coordination of all Federal and State legislative advocacy efforts, and the County's External Restructuring Program.

Office of Infrastructure and Environmental Services (Vicki Wilson) - Provides leadership and oversees management of the following county agencies/departments: Housing & Community Services, Resources & Development Management, Public Library, Integrated Waste Management Department, and Registrar of Voters. Coordinates service delivery and policy development of key countywide regional services to accomplish county corporate and regional goals.

APPENDIX C

LABOR MANAGEMENT COMMITTEE

The County Executive Office wishes to thank and acknowledge the contributions of the members of the Labor Management Committee.

2003 Committee:

Sponsor: Sharon Lightholder (CEO)
Darlene Bloom (COB)

Members: Sharron Anderson (CEO)
Carlos Bustamante (CEO)
Robert Connal (CEO)
Rosemary Dey (CEO)
Julie Mussche (CEO)
Ellen Naylor (CEO)
Tom Tousignant (CEO)
Pat Martinez (COB)
Charlene Weaver (COB)
Karen Davis (C/R)
Patty Turner (C/R)
Cynthia Viall (C/R)
Lorena Cornejo (C/R)
Kate Wiley/Gold (ROV)
Maria De La Torre (OCEA)

2003/2004 Committee:

Sharon Lightholder (CEO)
Darlene Bloom (COB)

Robert Connal (CEO)
Rosemary Dey (CEO)
Dennis Edwards (CEO)
Pat Martinez (COB)
Charlene McNair (COB)
Julie Mussche (CEO)
Lou Porras (OCEA)
Rosie Santiestiban (CEO)

2003 Accomplishments

- Developed a strategy and plan to enhance communication to members of the County Executive Office.
- Revised the design of the LMC website.
- Collected and reviewed cost reduction/revenue ideas as a part of the Countywide budget reduction effort initiated in 2002.
- LMC Workplace issued and addressed the concerns of the public and employees being exposed to smoke at the partially covered entrance to Building 12 near the Clerk-Recorder area of the building. Completing the enclosure and designating an alternate area for smoking resolved this issue. The Legislature has addressed this issue as well by passing a law extending a 20-foot no smoking zone around all other building entrances which law became effective January 1, 2004 .

Appendix C (Continued)

2003/2004 Goals

- Develop a protocol, which incorporates the LMC website, to solicit and communicate information regarding cost savings/revenue suggestions in support of the County's ongoing cost-savings program.
- Incorporate a better use of electronic resources, such as the website and email, to enhance communication between the LMC and office members regarding the mission, means of identifying workplace issues, purpose and accomplishments of the LMC.

APPENDIX D

ACCOMPLISHMENTS - 2003

The following is a list of projects completed in support of 2003 goals:

GOAL 1: *Facilitate, support and ensure the implementation of decisions by the Board of Supervisors*

- The 2003 County Strategic Financial Plan was adopted by the Board in March, 2003.
- The 2004 Business Plan process was implemented with final plans due in March, 2004.
- Conducted two public Budget Workshops to provide the Board with up-to-date information and data to assist the Board in becoming familiar with the fiscal challenges facing the County in the up-coming Fiscal Year, and to assist the Board in making the necessary decisions to adopt the FY 2003-04 County Budget.
- Briefed, on a weekly basis, each Board member and the Board Executive Assistants regarding future agenda items as well as off-agenda items to assist each Board office in preparing for Board meetings, and to keep them apprised of key policy issues.
- Published weekly legislative bulletins, the Legislative Scorecard for 2003, 14 Washington reports and three Sacramento reports.
- Monitored State and Federal legislative activity closely and assessed potential impacts to the 2003-04 budget following the Board adopted Legislative Platform and procedures.
- Updated and published the Community Indicators Report in March 2004.
- Completed labor contract negotiations and obtained Board approval of initial agreements for In-Home Supportive Services Public Authority (IHSS) and MOUs with Orange County Managers Association (OCMA), Association of Orange County Deputy Sheriffs (AOCDS) and Orange County Attorneys' Association (OCAA).
- Achieved significant progress on standardizing procurement solicitation and contract documents for human services, public works and architect-engineer procurements.
- Purchased all commercial insurance protecting County assets and provided these services to the new In-Home Supportive Services (IHSS) program per Board directive.

GOAL 2: *Improve County government's effectiveness in addressing community issues and trends*

- Provided training to County employees in core areas such as: LEAD, executive development and coaching, performance management and EEO.
- Labor Relations launched the "Bringing Out the Best in You" training program available to all non-supervisory employees and "Implementing Improvement Plans" for supervisors and managers.
- Continued discussions with labor organizations regarding the review and restructuring of Labor Management Committees.
- Conducted assessments of the County's performance management programs to obtain information on how to improve these programs.
- Implemented a new standardized County web site homepage format.
- Established a new search engine capability for the County web site that provides more accurate search results for internal staff and visitors to the site.
- Provided IT technical assistance to the Registrar of Voters to support the California Special Election.

GOAL 3: *Ensure the financial strength and integrity of the County of Orange*

- Developed the 2003 Strategic Financial Plan approved by the Board in March 2003.
- Presented a balanced budget for 2003-04 which was adopted by the Board on June 24, 2003.
- Redesigned and presented the quarterly budget report to include more in-depth information on the status of the County's revenues, expenditures, Net County Cost, budgeted positions and various agency/departamental budgeted issues.
- Initiated a collaborative process utilizing a committee of agency/departement representatives to obtain buy-in and recommendations on a comprehensive and integrated financial plan and biennial budget process.
- Maintained Moody's and Standard & Poor's credit ratings of Aa2 and A+, respectively, at the same time that the State of California's credit rating slips.
- Conducted summer investor relations meetings in New York.
- Completed the consent process with MBIA which removed the lien of the 1996 Recovery Certificates of Participation for eight County properties and which will allow the County to undertake other potential projects with these properties.
- Issued \$100 million in bonds for loan originations in Orange and Los Angeles Counties through SCHFA/CalHFA, a joint partnership with the State of California in Orange and Los Angeles Counties.

- Issued the Orange County Development Agency, Tax Allocation Refunding Bonds, Series 2003 for Santa Ana Heights in the amount of \$38.48 million which resulted in using \$10 million of prior bond proceeds for debt principal reduction and the present-value savings to the OCDA in the amount of \$5.2 million or 10.9% of the 1993 Bonds refunded.
- Improved coordination with Orange County Employees Retirement System on various retirement-related policy and financial issues and reached agreement on the ARBA (Additional Retirement Benefit Account) which offers assurance to retirees on continued healthcare subsidies which provide a three-year reserve to continue retiree health grants.
- Developed and recommended Board adopted comprehensive policy and related procedures for monitoring costs through tightened control over contract cost contingency increases.
- Began initial implementation of the Ad Hoc RFP.
- Issued numerous countywide master contracts to secure volume discounts and reduce duplicative procurement solicitations.
- Withdrew eight properties from the 1996 Recovery Certificates of Participation (COPS).
- Generated substantial revenues in the sale of surplus properties.
- Conducted and/or coordinated deputy purchasing agent training classes that focused on cost and financial risk reduction including negotiations and insurance.
- Developed strategies to secure new insurance protection and avoid new liability exposures related to terrorism.
- Developed and implemented comprehensive safety, loss prevention and insurance programs for the County.
- Completed 168 facility inspections; conducted 142 training classes for 2,042 employees; completed 136 ergonomic consultations and 11 Department Safety Program evaluations to improve safety and loss prevention capacity; continued active liaison and training with Departmental Safety Representatives.
- Relocated Enterprise Data Center administrative and technical staff from existing computer room space to other County space, then leased the vacant computer room to the ACS contractor, which, in turn, generated \$1.5 million in funds used to offset data center operations costs to constituents.
- Piloted the use of Adobe Online Forms/Workflow software to evaluate the potential cost savings of converting paper to electronic media as well as improving County business processes.
- Recommended and implemented a Board approved one-year County pilot project utilizing County staff to provide document-imaging support to agencies/departments. Use of the County team has provided improved services to agencies/departments and reduced costs for scanning by 30 – 50 %.

Goal 4: *Preserve and advance the interest of the Orange County Community by working with other levels of government and ensuring regional issues and needs are addressed*

- Completed a very active and successful legislative program in Sacramento and Washington, D.C.
- Facilitated and coordinated, with other public agencies, the annexation of 17 small, County islands into three cities.
- Countywide child care services were enhanced by opening 49 new licensed child care programs to serve an additional capacity of 3,695 children.
- Labor Relations continued tracking and monitoring legislation relating to workforce, employment and benefits issues as developments occurred during the legislative session and coordinated with CSAC and the CEO's Legislative Affairs to provide information on potential impacts and articulated positions.
- Established a City/County Committee consisting of City Managers and County executive management staff to discuss common issues, to develop ways to work together, address those issues, and share the information.
- Worked closely with the Local Agency Formation Commission (LAFCO) to develop strategies to address regional issues and regional service delivery.
- Prepared and published the 2004 Community Indicators Report in collaboration with other public agencies, which annually monitors major trends on several topics. The Report was presented to the Board of Supervisors and the Orange County Forum in March of 2004.
- Developed the framework and general design for an Employee Orientation Program
Continued coordination of the County's Rideshare Program in compliance with South Coast Air Quality Management District rules.